

# OFFICE OF FINANCIAL MANAGEMENT

BUDGET AND ALLOTMENT SUPPORT SYSTEMS (BASS)

## *BUDGET DEVELOPMENT SYSTEM (BDS)* **DECISION PACKAGE OVERVIEW** *TUTORIAL*

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*Version 2.1 Final*




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## **About this Tutorial**

This tutorial was developed to take agency staff through the sequential steps of building decision packages using BDS. The sample decision packages in this tutorial are developed at the activity and program level using the most basic features of BDS. This tutorial was developed for users with the Edit Access security level. Separate courses are available for agency budget staff responsible for BDS (BDS: Basic Budget and BDS: Advanced Lessons). The lessons in this tutorial are repeated in the BDS: Basic Budget tutorial and class.

This tutorial can be used in a formal training session, for individual practice, or developing the agency budget request. Actual values to be entered when using for training or for practice are **highlighted** on each task. Each step is preceded by a brief explanation of the task and its importance in your budget development as well as general business rules. Specific business rules and recommendations for entering your budget are denoted with a  on the task. Appendix 1 contains a central listing of all these business rules.

Every effort is made to ensure that the BDS tutorial and OFM Budget Instructions agree in every way. In case there is a discrepancy, the OFM Budget Instructions take precedence.

Not every feature of BDS will be covered in either the basic or the advanced training. The BDS Complete System Manual is available to users. This document explains every function of BDS screen by screen and is all-inclusive. This document will be made available at training sessions or it is also available on-line in the BASS Library under the BDS reference desk (<http://bass.ofm.wa.gov/basspr/library/bds.htm> or <https://services-bass.ofm.wa.gov/basspr/library/bds.htm>) for Fortress users. Full documentation on all BASS products is available in the BASS Virtual Library available on-line at <http://bass.ofm.wa.gov/basspr/library/> or <https://services-bass.ofm.wa.gov/basspr/library/> for Fortress users. The library may also be accessed by the help links available in the BASS applications.

## **LESSON 1 – MAINTENANCE AND PERFORMANCE LEVEL DECISION PACKAGES**

## Lesson 1, Task 1 - Create Decision Packages

Decision packages are the building blocks - and the most important components - of the budget request. The decision package is the place for the agency to make a persuasive case for the requested change.

Decision packages organize and describe proposed cost changes in a way that highlights the budget decisions. The decision package consolidates the financial information, the supporting justification and the statement of impact for a specific action or policy proposed for implementation in the budget. One decision package describes a proposed item of change listed on the Recommendation Summary.

All maintenance level decision packages and a few performance level decision packages should use statewide standard OFM pre-assigned numbers. The budget instructions explain the use of these numbers. OFM pre-assigned numbers all begin with 9 and have been pre-named in BDS. Use the corresponding number as defined in the budget instructions and the title that has been pre-assigned in BDS. For example, 98 is the OFM pre-assigned number for general inflation.

Refer to the OFM Budget Instructions for more detail.

1. Open Internet Explorer and enter the login address <http://bass.ofm.wa.gov/basspr/login/login.asp> (or <https://services-bass.ofm.wa.gov/basspr/login/login.asp> for Fortress users) in the address bar of the browser.  
**If in a training session, skip this step**
2. Use your login ID and password to log in to BASS. *If you do not have a login ID and password, a security form is included in the back of the tutorial. Follow the instructions on the form.*  
**10500trainEA**  
**trainEA**



3. Select the calculator icon for **Budget Development System (BDS)**.

## BDS Menu

Load my agency budget base (AFRS Extract)

Adjust my budget base (View/Edit CB Level Decision Packages)

Add decision package to my base

Update decision packages

Re-prioritize my agency's decision packages

Lock a decision package

Lock a budget version

Other budget management options

Verify data to be released to OFM

Exit to Main Menu      Exit and Logoff      BDS Help

- Select **Add decision package to my base** from the BDS menu.

### Add New Decision Package

Enter the information below that will define the new decision package.

Budget Period: 2005-07

Version: DP - Use a different version - see s

Budget Level: M2 - Inflation and Other Rate Chan

Decision Package Code: M28L

View Decision Package Codes

☐ Used for this Version

☒ Available for this Version

8G - Approved Allotments Above

8H - Assessments

8I - 2002 Reduction Allocations

8J - Pension CF

8K - Health Benefits CF

8L - Lease Rate Adjustments

\* indicates reusable codes

Package Program: Agency Level

Package Title: Lease Rate Adjustments

Package Long Title: Lease Rate Adjustments

☒ Open this decision package after Save. Decision package filter will be modified.

Save Cancel

- Select the appropriate **Budget Period** from the drop down list box.  
2005-07
- Select the appropriate **Version** from the drop down list box. *Note: Contact your budget officer to find out which version you should be using if you are not sure.*  
See Exercise Slip

7. Select **M2 – Inflation and Other Rate Changes** from the **Budget Level** drop down list box.
8. Select an available decision package code from the list under **View Decision Package Codes**.  
*Note: Maintenance level decision packages should be assigned a decision package code based on the OFM pre-assigned codes where applicable. If there is not an appropriate OFM pre-assigned code for your maintenance level decision package, or if the decision package is Performance Level, you should use a numeric-alpha (1A) or alpha-alpha (AA) code.*  
**8L-Lease Rate Adjustments**
9. Leave the **Package Program** drop down box at the default of **Agency Level**. *Note: Agency level means it can contain any agency program. Use of package program is an advanced feature that is not discussed further in this tutorial. The use of package program is only recommended in rare cases, such as DSHS budget building.*
10. Note the **Package Title** and **Package Long Title** for this decision package. *Note: Decision package code 8L is pre-assigned by OFM. The title for this decision package code cannot be changed. Agency decision packages that are for requesting funding to cover Lease Rate changes should be entered using this code and title. This rationale applies to all OFM pre-assigned decision package codes. Please see the budget instructions for further information.*  
**Lease Rate Adjustments**
11. Click to check the **Open this decision package after Save**. **Decision package filter will be modified.**
12. Click the **Save** button then **Yes** to confirm selections and **OK** when saved. *Note: Since you have checked to open after save, the decision package will automatically open. It opens to the Package Narrative screen, as narrative is required for this budget level.*

**Decision Package Console - Package Narrative - M2-8L Lease Rate Adjustments**

File Edit View Tools Reports Help

Affected Programs Agency Level

**Package Description. (Please also indicate the agency activities -- per your agency activity inventory -- affected by this package.)**  
 This decision package represents the additional funding needed for Seattle lease increase.

**Recommendation summary text. (Used in OFM Budget Systems)**  
 Funding required to keep up with the rising lease charges in King County.

**How this decision package contributes to the agency's strategic plan and its activities and strategies.**




**Reason for the change.**


This decision package represents the additional funding needed for Seattle lease increase.

Undo  
 Cut  
 Copy  
 Paste  
 Delete  
 Select All

Spell Check Apply Reset

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: M2-8L 5.0.153

13. Click on the **Package Description** heading on the left. Your cursor should now be in the right hand side white text box.
14. Type an appropriate description for this decision package in this text box.  *Note: You may paste text from another document in here by hitting <CTRL-V> or using the right mouse button.*  
**This decision package represents the additional funding needed for Seattle office lease increase...**
15. Click the **Spell Check** button and follow the instructions of any dialog boxes you receive until back at the starting screen and spell check changes are recorded.  *Note: You will not be able to add new words to the dictionary in BDS. This may be inconvenient if using acronyms.*
16. Click the **Recommendation summary text** heading.
17. Use the scroll bar of the left-hand side of the screen to scroll up and verify information entered in the **Package Description** is displayed in blue text.
18. Type appropriate Recommendation Summary text in the white text box.  *Note: Recommendation Summary text is a very brief summary of the decision package. This entry is used as the basis for the Governor's budget text. The budget instructions ask that you limit this to 100 words.*  
**Funding required to keep up with the rising lease charges in King County.**
19. Repeat for each category as needed.

 *A note about decision package narrative– Recommendation Summary text is the only category required for **electronic** release of your budget. OFM does require you address all categories on the printed decision package, but if you are preparing your decision package outside of BDS, you need only record Recommendation Summary text here.*

20. Select **File / Save Current Tab Set** from the BDS menu bar.
21. Select **Edit / Expenditure Detail Amounts** from the **BDS menu bar**.

**Decision Package Console - Expenditure/Staffing Detail Amounts - M2-8L Lease Rate Adjustments**

File Edit View Tools Reports Help

Fund Detail | Objects of Expenditure Detail | FTE Detail | Affected Programs/Activities | Expenditure Notes

Fund AT Code	Fund AT Title	Total FY2006	Total FY2007	Agency Lvl FY 2006	Agency Lvl FY 2007
996-Z	Estimated All Other - Other	0	0	0	0
	<b>Total Fund 996</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<-- Enter Fund Here				
<b>Total</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>Biennial Total</b>		<b>0</b>		<b>0</b>

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: M2-8L 5.0.153

22. Click on the **Affected Programs/Activities** tab once the new screen loads.

**Decision Package Console - Expenditure/Staffing Detail Amounts - M2-8L Lease Rate Adjustments**

File Edit View Tools Reports Help

Fund Detail | Objects of Expenditure Detail | FTE Detail | **Affected Programs/Activities** | Expenditure Notes

Additions or removals of Affected Programs/Activities in this window affect the expenditure detail worksheets only.  
Programs/Activities (including Agency Level) can be added to or removed from the Affected Programs/Activities list.

Available Programs

- Agency Level
- 010 - Administration
- 020 - Budget
- 030 - Information Services
- 040 - Accounting & Adminis**
- 050 - Statewide Accounting
- 060 - Statewide Policy
- 070 - Forecasting
- 080 - Management
- 083 - Risk Management - AI
- 090 - Lid
- 110 - Statewide Systems

Available Activities

- A001 Accounting Services for Other
- A002 Administrative Activity
- A003 Assessment Payments on Stat
- A004 Budget Driver and Expenditure
- A005 Central Financial Systems Dev
- A006 Collective Bargaining
- A007 Criminal History Federal Grant
- A008 Governor's Budget Developme
- A009 Office of Regulatory Assistanc
- A010 Personal Service and Client S
- A011 Population Estimates, Forecas

Affected Programs/Activities

- 030 - Information Services
- 040 - Accounting & Adminis**

Save Cancel

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: M2-8L 5.0.153

23. Double click on **Agency Level** in **Affected Programs/Activities** list (the right-side box) to move it to **Available Programs** (left-side). *Note: There are two **Affected Programs** tabs in BDS. One provides the ability to enter narrative text by program. This **Affected Programs** tab creates program columns in expenditure worksheets for recording cost estimates by program.*
24. Click on the appropriate program in the **Available Programs** (left-side) list and the blank line in **Available Activities** (center) and click the > to move to the selection to **Affected Program/Activities**. Repeat for each program affected by this decision package. *Note: The*

*Affected Programs* tab is the easiest way to code your estimated expenditures to the appropriate program. This step is required if your agency is appropriated by program. This step is recommended if your agency has more than one program. Skip this step if your agency has only one program.

030

040

25. Click the **Save** button and **Yes** on 'okay to delete agency level column' message box.
26. Click the **Fund Detail** tab.

Decision Package Console - Expenditure/Staffing Detail Amounts - M2-8L Lease Rate Adjustments							
File Edit View Tools Reports Help							
Fund Detail   Objects of Expenditure Detail   FTE Detail   Affected Programs/Activities   Expenditure Notes							
Fund AT Code	Fund AT Title	Total FY2006	Total FY2007	Program 030 FY 2006	Program 030 FY 2007	Program 040 FY 2006	Program 040 FY 2007
406-1	Sal & Insur Incr-Rev - State	15,000	20,000	5,000	10,000	10,000	
	<b>Total Fund 406</b>	<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>1</b>
	<-- Enter Fund Here						
<b>Total</b>		<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>1</b>
	<b>Biennial Total</b>		<b>35,000</b>		<b>15,000</b>		<b>2</b>

27. Enter the appropriate fund/appropriation type combination in the cell to the left **<-- Enter Fund Here** and hit the **Tab** key.

4061

28. Enter the fund estimates by program in the worksheet.

	Program 030			Program 040	
	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal		1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal
	Year	Year		Year	Year
406-1	5,000	10,000		10,000	10,000

29. Click on the row for fund 996-Z then select **Edit / Delete Worksheet Row** from the BDS bar.

*A note about Fund 996-Z – this is a placeholder fund only. This fund may be used in the interim for budget development, however any dollars must be allocated to real funds and 996-Z be zero before agencies can release data to OFM.*

30. Select the **Objects of Expenditure Detail** tab.

Decision Package Console - Expenditure/Staffing Detail Amounts - M2-8L Lease Rate Adjustments							
File Edit View Tools Reports Help							
Fund Detail Objects of Expenditure Detail FTE Detail Affected Programs/Activities Expenditure Notes							
Object Code	Object Title	Total FY2006	Total FY2007	Program 030 FY 2006	Program 030 FY 2007	Program 040 FY	Program 040 FY
ED	Rentals and Leases	15,000	20,000	5,000	10,000	10,000	10,000
	<b>Total Sub Object ED</b>	<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>
	<b>Total Object E</b>	<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>
	← Enter Objects Here						
<b>Total</b>		<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>
	<b>Biennial Total</b>		<b>35,000</b>		<b>15,000</b>		<b>20,000</b>
	<b>Fund Totals</b>	<b>15,000</b>	<b>20,000</b>	<b>5,000</b>	<b>10,000</b>	<b>10,000</b>	<b>10,000</b>
	<b>Difference Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: M2-8L

5.0.153

31. Enter the appropriate Object code in the cell to the left of ← Enter Objects Here. **ED – Rentals and Leases**

*A note about objects – Objects are not required in BDS decision packages. However, using objects in decision packages is recommended. By including objects in all steps of your budget development you will be able to use BDS reports and data for more complete analysis. The level of object to enter data at will vary by agency. One option is to enter objects at the same level you allot.*

32. Select anywhere in the row for X – OFM Adjust To Agency then select **Edit / Delete Worksheet Row** from the BDS menu bar. *Note: Object X is a placeholder only.*
33. Enter your estimates by object and program into the worksheet.

	Program 030		Program 040	
	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year
<b>ED-Rentals and Leases</b>	5,000	10,000	10,000	10,000

34. Select **View / Balance Funds to Objects** to verify that the objects entered balance with the funds entered.
35. Select **File / Save Current Tab Set** from the BDS menu bar.
36. Select **File / Add a decision package** from the BDS menu bar.

37. Add a performance level decision package using the steps 5 through 13:

**Budget Period** – 2005-07

**Version** – See Exercise Slip

**Package Program** – Agency Level

**Budget Level** – PL – Performance Level


**Decision Package Code** – See Exercise Slip


**Package Title** – Expand Client Training Program

38. Enter and save appropriate **Recommendation Summary Text** using the steps learned in the preceding task.

Funding is requested to allow for expansion of training opportunities for Department clients so that they can get information helpful to their success.

39. Repeat for each category as needed.
40. Select **File / Save Current Tab Set** to save changes.

 A note about decision package narrative– Recommendation Summary text is the only category required for **electronic** release of your budget. OFM does require you to address all categories on the printed decision package, but if you are preparing your decision package outside of BDS, you need only record Recommendation Summary text here.

41. Select **Edit / Expenditure Detail Amounts** from the BDS menu bar.
42. Select the **Affected Programs/Activities** tab.
43. Highlight **Agency Level** in the **Affected Programs/Activities** column and the < to move out of the list.  Note: There is no blank Activity option when the decision package is at performance level. Performance level decision package require all estimates be identified to an activity.
44. Use the combination of **Available Program** and **Available Activity** for each combination of program and activity with incremental adjustments in this decision package and use the > to move each combination into the **Affected Programs/Activities** list.

**Program / Activity**

020 / A005

020 / A013

**Decision Package Console - Expenditure/Staffing Detail Amounts - PL-AH Expand Client Training Program**

File Edit View Tools Reports Help

Fund Detail Objects of Expenditure Detail FTE Detail Affected Programs/Activities Expenditure Notes

Additions or removals of Affected Programs/Activities in this window affect the expenditure detail worksheets only.

Programs/Activities (including Agency Level) can be added to or removed from the Affected Programs/Activities list.

Available Programs	Available Activities	Affected Programs/Activities
Agency Level	A002 Administrative Activity	020/A005 Central Financial Systems D
010 - Administration	A003 Assessment Payments on Stat	020/A013 Statewide Accounting Polici
<b>020 - Budget</b>	A004 Budget Driver and Expenditure	
030 - Information Services	A005 Central Financial Systems Dev	
040 - Accounting & Adminis	A006 Collective Bargaining	
050 - Statewide Accounting	A007 Criminal History Federal Grant	
060 - Statewide Policy	A008 Governor's Budget Developme	
070 - Forecasting	A009 Office of Regulatory Assistanc	
080 - Management	A010 Personal Service and Client S	
083 - Risk Management - AI	A011 Population Estimates, Forecas	
090 - Lid	A012 Risk Management	
110 - Statewide Systems	<b>A013 Statewide Accounting Policies</b>	

Save Cancel

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-AH 5.0.153

45. Select **Save** and answer **Yes** to the prompt regarding the removal of the agency level column.
46. Go to the **Fund Detail** tab to enter estimates by fund and program/activity combination.

Fund	Program 020 / Activity A005		Program 020 / Activity A013	
	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal
	Year	Year	Year	Year
001-1	15,000	20,000	15,000	20,000

47. Go to the **Objects of Expenditure Detail** tab to enter estimates by object and program/activity combination.

Object	Program 020 / Activity A005		Program 020 / Activity A013	
	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal
	Year	Year	Year	Year
A	11,000	14,600	11,000	14,600
B	4,000	5,400	4,000	5,400

48. Select **View / Balance Funds to Objects** from the BDS menu bar to verify funds and objects are in balance.
49. Go to the **FTE Detail** tab to enter FTE estimates by fund and program/activity combination.

Fund	Program 020 / Activity A005		Program 020 / Activity A013	
	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal	1 <sup>st</sup> Fiscal	2 <sup>nd</sup> Fiscal
	Year	Year	Year	Year
001-1	.4	.5	.4	.5

50. Select **File / Save Current Tab Set** to save changes.

51. Select **Edit / Performance Measures** from the BDS Menu Bar.

Decision Package Console - Performance Measures - PL-AH Expand Client Training Program

File Edit View Tools Reports Help

Activities | Performance Measure Detail | Performance Measure Notes

Supported	Activity Title
<input type="checkbox"/>	A001 - Accounting Services for Other Agencies
<input type="checkbox"/>	A002 - Administrative Activity
<input type="checkbox"/>	A003 - Assessment Payments on State Lands
<input type="checkbox"/>	A004 - Budget Driver and Expenditure Forecasts, Research and Monitoring
<input checked="" type="checkbox"/>	A005 - Central Financial Systems Development and Maintenance
<input type="checkbox"/>	A006 - Collective Bargaining
<input type="checkbox"/>	A007 - Criminal History Federal Grant
<input checked="" type="checkbox"/>	A008 - Governor's Budget Development
<input type="checkbox"/>	A009 - Office of Regulatory Assistance
<input type="checkbox"/>	A010 - Personal Service and Client Service Contracts
<input type="checkbox"/>	A011 - Population Estimates, Forecasts and Census Data
<input type="checkbox"/>	A012 - Risk Management
<input checked="" type="checkbox"/>	A013 - Statewide Accounting Policies and Reporting

Apply Reset

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-AH 5.0.153

52. Click to check each Activity that is supported by the decision package in the **Supported** column and click **Apply**. *Note: The list of supported activities may or may not mirror the list of activities with incremental estimates. In this example estimates were built in for two activities (Central Financial System and Statewide Accounting Policies as these two activities will pick up the expenditure for the training expansion, yet it also supports the agency activity of Governor's Budget Development because it is assumed the resulting training is expected to result in more accurate agency budget submittals and a more efficient OFM analysis.*

A005  
A008  
A013

53. Select the **Performance Measure Detail** tab.

**Decision Package Console - Performance Measures - PL-AH Expand Client Training Program**

File Edit View Tools Reports Help

Activities Performance Measure Detail Performance Measure Notes

Impacted	PM Type	Performance Title	Unit	Incremental Change FY1	Incremental Change FY2	Prior Bien FY1	Prior Bien FY2
<input checked="" type="checkbox"/>	OP	1010 - Fastrack Reports	Number	200.00	500.00	400	600
<input checked="" type="checkbox"/>	OP	1020 - Travel Voucher System \	Number	2,500.00	7,000.00	10000	12500
<input type="checkbox"/>	OC	8010 - Hands-off Payments	Percent	0.00	0.00	45	50
<input type="checkbox"/>	OC	8020 - Electronic Payments	Percent	0.00	0.00	30	31

Apply Reset

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-AH 5.0.153

54. Enter the estimated incremental change in the performance measures as a result of this decision package.

Performance Measure	Incremental Change	
	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year
1010 – Fastrack Reports	200.00	500.00
1020 – Travel Voucher System Vouchers	2,500.00	7,000.00

55. Click **Apply** to save changes.
56. Repeat for each performance level decision package.  
In a training session and one or two more decision package as time allows for practice. One example is provided below. Think back to past submittals or known future submittals for you agency.

Budget Period: 2005-07  
Version: See Exercise Slip  
Package Program: Agency level  
Budget Level: PL – Performance Level  
Decision Package Code: See Exercise Slip  
Decision Package Title: Increase program capacity

All Fund 001-1 and Object N	2004	2005
Program/Activity		
040/A010	17,500	20,000

Recommendation Summary Text: Funding requested to provide dollars to the Department to expand services to a greater percentage of qualified clients.

Activity: A010 Personal Services and Client Services Contracts

Performance Measure: None affect, leave blank.

57. Select **File / Exit to BDS Menu** when all decision packages are entered and saved.

## Lesson 1, Task 2 – Run a Pre-Release Edit Report

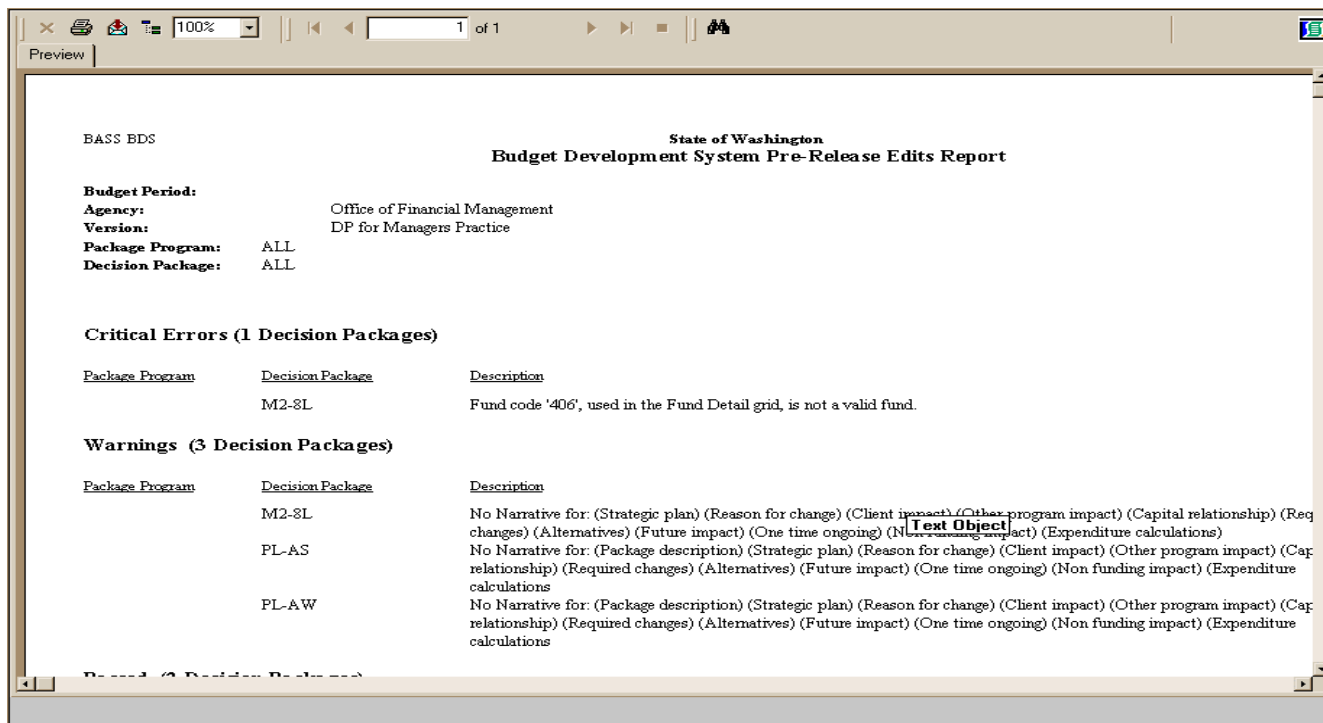
BDS has a Pre-Release Edit Report that allows users to verify that data in BDS meets all electronic release requirements as well as warnings on various business rules. This report should be run prior to printing copies of the OFM submittal reports to control the number of re-prints. This report can and should be run early and often in your budget development to ensure there are no last minute surprises on release day.

1. From the BDS menu select **Verify data to be released to OFM / BDS Budget Data**.

The screenshot shows the 'BDS Menu' window with a yellow background. The title 'BDS Menu' is in blue. Below the title are several menu items: 'Load my agency budget base (AFRS Extract)', 'Adjust my budget base (View/Edit CB Level Decision Packages)', 'Add decision package to my base', 'Update decision packages', 'Re-prioritize my agency's decision packages', 'Lock a decision package', 'Lock a budget version', and 'Other budget management options'. The 'Verify data to be released to OFM' option is highlighted in blue. To its right is a sub-menu with two options: 'BDS Budget Data' (highlighted in blue) and 'BDS Governor's Recast Data'. At the bottom of the menu are three buttons: 'Exit to Main Menu', 'Exit and Logoff', and 'BDS Help'.

The screenshot shows the 'Pre-Release BDS Budget Data' dialog box. The title bar is blue with the text 'Pre-Release BDS Budget Data' and a close button. The main area has a white background with the text 'Pre-Release BDS Budget Data' and 'Make your selections below.' Below this are several input fields: 'Budget Period' (a dropdown menu showing '2005-07'), 'Budget Type' (a dropdown menu showing 'Regular'), 'Version' (a dropdown menu showing 'DP - Use a different version - see slip'), 'Package Program' (a dropdown menu showing 'ALL'), and 'Decision Package' (a dropdown menu showing 'ALL'). At the bottom right are two buttons: 'OK' and 'Cancel'.

2. Select the appropriate **Budget Period**, **Budget Type**, and **Version** from the drop down lists boxes.  
**See Exercise Slip**
3. Select **All** for **Package Program** and **Decision Package**.
4. Click **OK**.



5. Click the printer icon to print a copy of the report.  
**Skip this step in training**
6. Review the report and determine if any decision package items should be addressed then click **Return** to return to the BDS menu. *Note: Critical items MUST be corrected in order to electronically release data. Warnings indicate that there is something that might not be consistent with business rules, however the electronic release will not be prohibited. Ignore error messages that are not decision package specific. The correction of these is outside of the scope of the Decision Package Overview tutorial.*
7. Click on **Update decision packages** once you have determined what decision packages need to be updated.

**Budget Summary Console - List Decision Packages by ID**

File Edit View Tools Reports Help

List Decision Packages by ID

	Package Program	Decision Package	Title	Agency Priority	Program Priority	Status	Loc
1	M2-8L	Lease Rate Adjustments		0		Draft	
2	PL-AH	Expand Client Training Program		0		Draft	
3	PL-BH	Increase Program Capacity		0		Draft	

Sort Set Filter to All

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: ALL Budget Level: ALL 5.0.153

8. Verify in the bottom status bar that you are still on the appropriate version.  
See Exercise Slip
9. If the status bar indicates you are on the wrong version, select **File / Change Version/DP Filter** from the BDS menu bar and enter the options to reflect the appropriate budget period and versions.  
See Exercise Slip

**Decision Package Filter Screen**

**Decision Package Filter Criteria**  
Enter the information below that will define the filter criteria.

Budget Period: 2005-07 Version: DP - Use a different version - see slip

Package Program: All Budget Level: All

☐ View Locked Decision Packages Only

OK Reset Cancel

10. Click once on the decision package to highlight.  
M2-8L – Lease Rate Increase
11. Select **Edit** / then the piece of the decision package you are choosing to update.  
Expenditure Detail

**Decision Package Console - Expenditure/Staffing Detail Amounts - M2-8L Lease Rate Adjustments**

File **Edit** View Tools Reports Help

Fund C

TE Detail Affected Programs/Activities Expenditure Notes

Fund C	Total FY2006	Total FY2007	Program 030 FY 2006	Program 030 FY 2007	Program 040 FY 2006	Program 040 FY 2007
001	15,000	20,000	5,000	10,000	10,000	
406	15,000	20,000	5,000	10,000	10,000	1
<b>Total Fund 406</b>	15,000	20,000	5,000	10,000	10,000	1
<b>&lt;-- Enter Fund Here</b>						
<b>Total</b>	30,000	40,000	10,000	20,000	20,000	2
<b>Biennial Total</b>		70,000		30,000		4

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: M2-8L 5.0.153

- Make necessary changes.

Add a row for fund 001-1

Enter amounts for 406-1 into fund 001-1.

Click once in the row for fund 406-1 and select **Edit / Delete Worksheet Row**

Select **File / Save Current Tab Set** to save changes.

- Select **Edit** / to pick another section of the decision package to edit (if necessary).  
**Skip this in training**
- When all decision packages have been updated, select either **File / Exit to BDS Menu** if no further changes are needed or **File / Open Decision Package** to select the next decision package.  
**File / Exit to BDS Menu**
- Repeat steps 1 through 6 to run a new Pre-Release Edit Report.



## **LESSON 2 – REVIEW AND REVISE DECISION PACKAGES**

## Lesson 2, Task 1 – Print, Review, and Revise Decision Packages

This step is recommended before marking decision packages as final and printing the official copy of budget reports. This will allow you to analyze and correct any errors before proceeding too far in your budget development process.

1. Select **Update decision packages** from the BDS menu.

The screenshot shows a software window titled "Budget Summary Console - List Decision Packages by ID". It has a menu bar with "File", "Edit", "View", "Tools", "Reports", and "Help". Below the menu bar is a tab labeled "List Decision Packages by ID". The main area contains a table with the following data:

	Package Program	Decision Package	Title	Agency Priority	Program Priority	Status	Loc
1		M2-8L	Lease Rate Adjustments	0		Draft	
2		PL-AH	Expand Client Training Program	0		Draft	
3		PL-BH	Increase Program Capacity	0		Draft	

At the bottom of the window, there is a status bar that reads: "Agency: 105 Budget Period: 2005-07 Version: DP Package Program: ALL Budget Level: ALL" and a version number "5.0.153". There are also "Sort" and "Set Filter to All" buttons.

2. Click once to highlight the first maintenance level decision package, then select **Reports / OFM Reports / Decision Package** (or Decision Package with Program Detail if your agency is appropriated by program).
3. Click **No** for "Do you want this report formatted for Word?"

The screenshot shows a report titled "State of Washington Decision Package". The report is for Agency 105, Office of Financial Management, and is marked as a DRAFT. The decision package code is 8L, titled "Lease Rate Adjustments". The budget period is 2005-07, and the budget level is M2 - Inflation and Other Rate Changes. The recommendation summary text states: "Funding required to keep up with the rising lease charges in King County." The fiscal detail table shows the following data:

Operating Expenditures	FY 2006	FY 2007	Total
001-1 General Fund - Basic Account-State	15,000	20,000	35,000
<b>Total Cost</b>	<b>15,000</b>	<b>20,000</b>	<b>35,000</b>

The report is generated by the subreport "dp\_ofm\_fte.rpt".

4. Click the printer icon to print a copy of this report. *📖 Note: You have the option of downloading this report for Word by clicking the icon with the envelope and red arrow and saving as file type "Word". If you choose this option, you should have replied Yes above. Once in Word, you would be able to add any custom formatting or necessary graphics.*  
**Skip printing in training.**
5. Click **Return** to return to the list of decision packages.
6. Repeat steps 2 through 5 for each maintenance and performance level decision package.
7. Review the printed decision packages and note any needed changes. *📖 Note: Decision package titles can be changed in the Decision Package Management / Agency Decision Package Identification screen. Only users with Budget Operations security have access to this screen. Contact your budget office if you need a decision package title changed and do not have access.*  
**In training, assume all okay and skip to step 13**
8. If changes are required, click once to highlight the decision package then select **Edit** / and the piece of the decision package that needs updating.
9. Make changes as necessary.
10. With the decision package open, select **Reports / OFM Reports / Decision Package** (or Decision Package Program Detail) and print or review on-line and click **Return** to go back to the decision package. *📖 Note: Agencies that are appropriated by program should run the Decision Package Program Detail so the estimates will be displayed by program.*
11. When the decision package is correct, select **File / Open Decision Package** or **File / Exit to BDS Menu** if all edits are completed and click **Yes** to save when prompted.
12. Repeat steps 8 through 11 for each decision package requiring change.
13. Select **File / Exit to BDS Menu** when comfortable with all reports.
14. Select **Verify data to be released to OFM / BDS Budget Data** for one last review of **Pre-Release Edit Report**.

## Lesson 2, Task 2 – Share a Decision Package

There are a few ways to share a decision package you have entered when you are ready to proceed with the decision package. This task will demonstrate the option of e-mailing a decision package.

1. Select **Update Decision Packages** from the BDS Menu.
2. Click once to highlight a decision package you are ready to proceed with.  
**See Exercise Slip**
3. Select **Reports / OFM Reports / Decision Package**. *Note: If you are one of the following agencies, select the Decision Package with Program Detail Report: DOC, DSHS, DVA, DOT, WSP, DOL, DOT, BRI, SPI, CRS.*
4. Answer **Yes** for "Do you want this formatted for Word?" *Note: Formatting for Word makes adjustments in the header and page number so that the report displays in Word properly.*

State of Washington  
Decision Package

**DRAFT**

Agency: **105 Office of Financial Management**

Decision Package Code/Title: **BH Increase Program Capacity**

Budget Period: **2005-07**

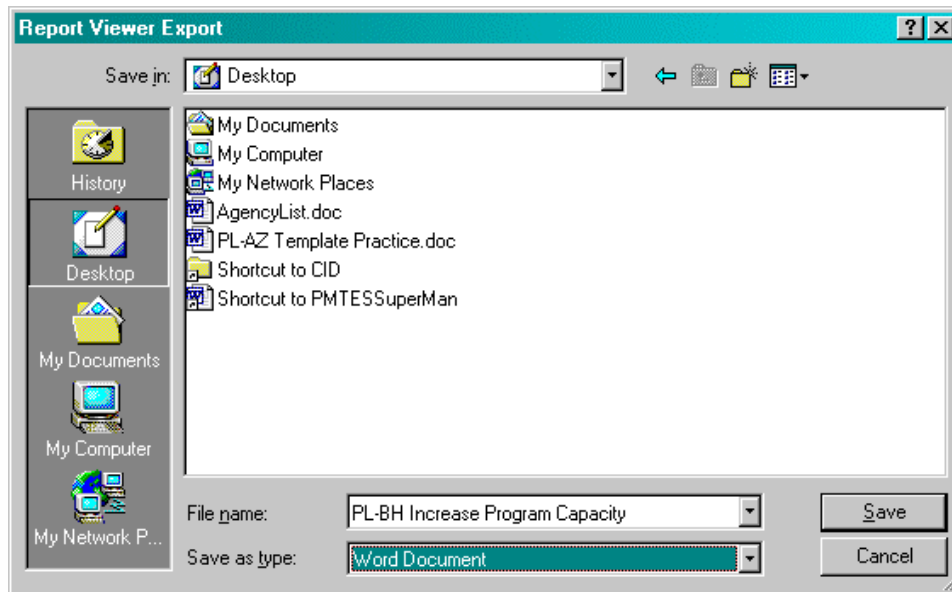
Budget Level: **PL - Performance Level**

**Recommendation Summary Text:**  
Funding requested to provide dollars to the Department to expand services to a greater percentage of qualified clients.

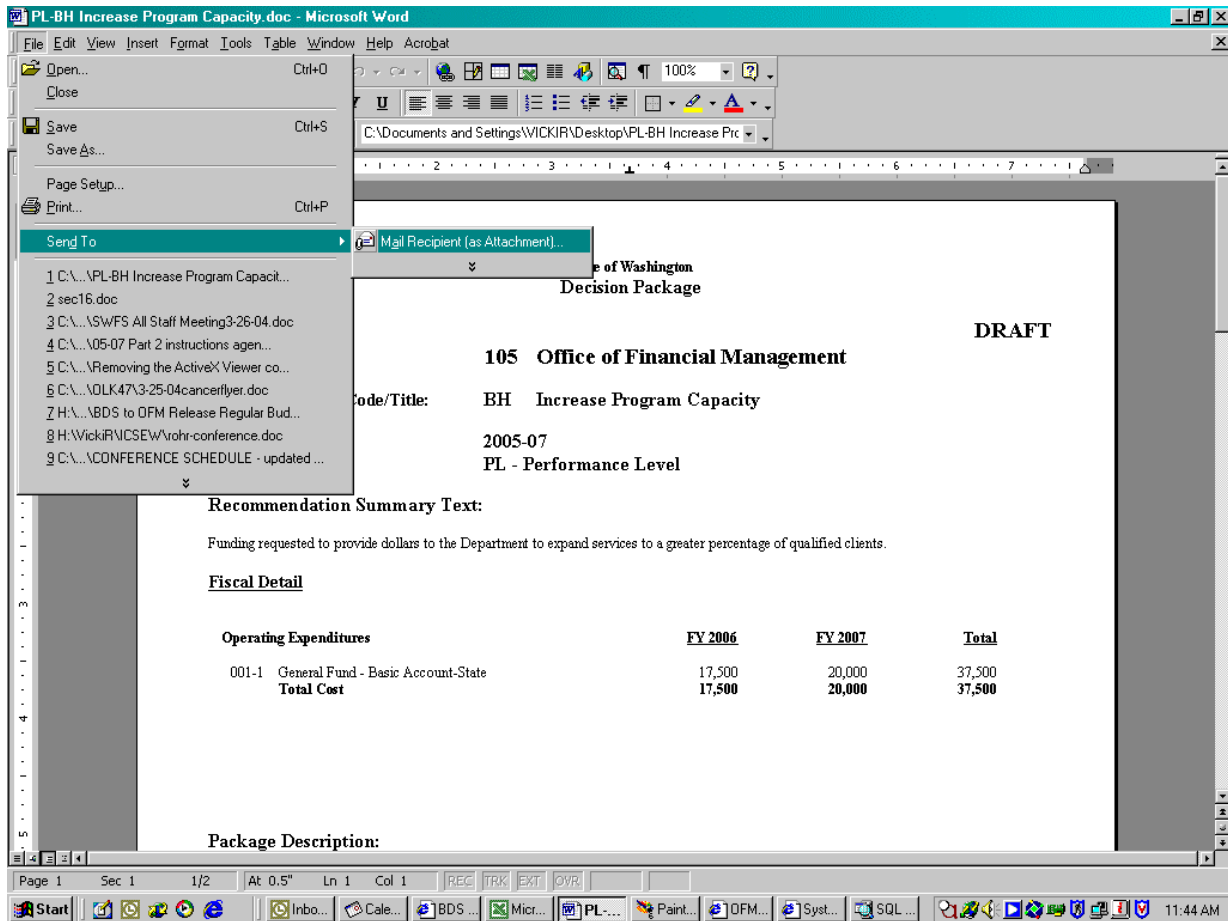
**Fiscal Detail**

Operating Expenditures	<u>FY 2006</u>	<u>FY 2007</u>	<u>Total</u>
001-1 General Fund - Basic Account-State	17,500	20,000	37,500
<b>Total Cost</b>	<b>17,500</b>	<b>20,000</b>	<b>37,500</b>

5. Click the envelope icon with the red arrow after the report is displayed.



6. Change **Save as type** to **Word Document**.
7. Change the **Save in** option to reflect the drive and directory you would like to save the decision package in. *Note: Save decision packages to an appropriate directory for your organization for easy sharing. This may be a central network drive.*  
**Desktop**
8. Save with the decision package code and title  
**See Exercise Slip**
9. Answer **Yes** for "**The report has been exported. Would you like to open it?**"

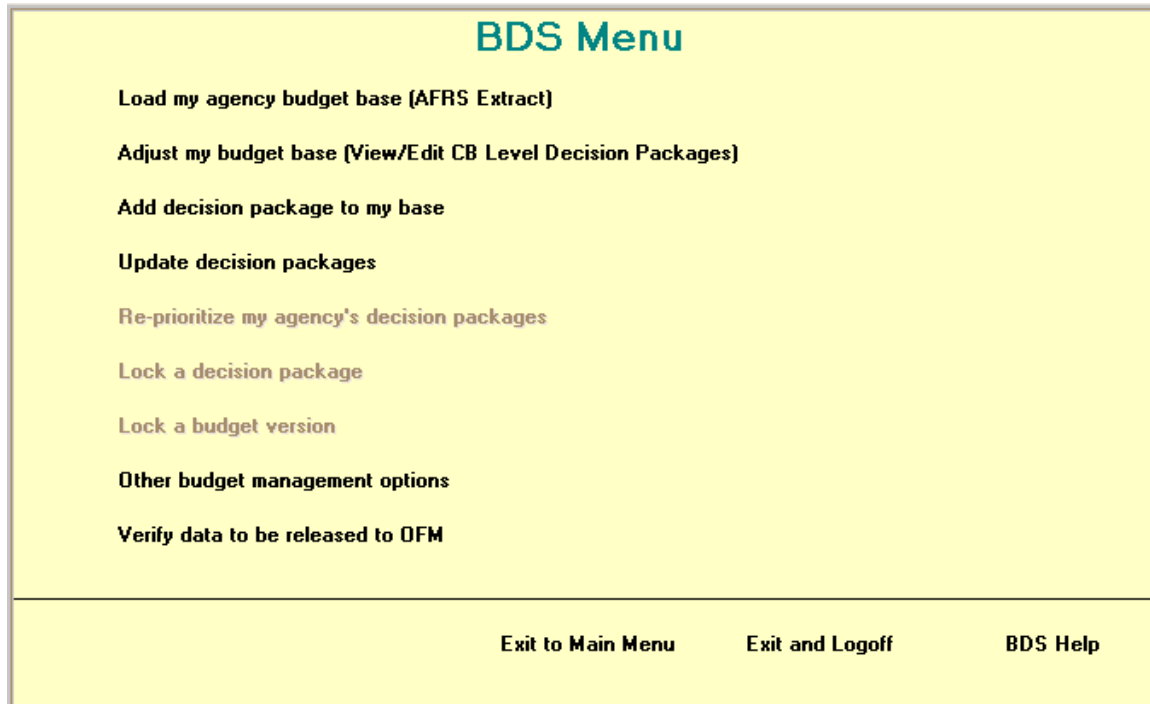


10. Once the report has opened in Word, select **File / Send To / Mail Recipient (As Attachment)**.  
View this option, but do not select when in training
11. Send e-mail as normal. The Decision Package is attached.
12. Close Word and return to BDS.
13. Click **Return** to close the report in BASS.
14. Select **File / Exit to BDS Menu**.

## **LESSON 3 – CREATING A DECISION PACKAGE FROM A TEMPLATE**

### Lesson 3, Task 1 – Use a Decision Package Template

Any decision package may be used as a template with the **File / Save As** command. A model decision package can be "saved as" a new decision package with appropriate identifying information. This task was written as a lesson that can be shared with agency staff in the event the central budget office has determined decision package templates are the best way to facilitate decision package development in the agency.



1. Select **Update Decision Packages** from the BDS menu.

**Budget Summary Console - List Decision Packages by ID**

File Edit View Tools Reports Help

List Decision Packages by ID

	Package Program	Decision Package	Title	Agency Priority	Program Priority	Status	Loc
1		M2-8L	Lease Rate Increase	0		Draft	
2		PL-AS	Increase Program Capacity	0		Draft	
3		PL-AW	Expand Training Opportunities	0		Draft	

Sort Set Filter to All

Agency: 105 Budget Period: 2003-05 Version: MG Package Program: ALL Budget Level: ALL 5.0.26

- Look at the status bar on the bottom of the screen to see if you are on the templates version.  
**TP**
- If this line does not indicate version TP, select **File / Change Version/DP Filter**.

**Decision Package Filter Screen**

**Decision Package Filter Criteria**  
Enter the information below that will define the filter criteria.

Budget Period: 2005-07 Version: TP - Template Version

Package Program: All Budget Level: All

☐ View Locked Decision Packages Only

OK Reset Cancel

- Change the filter options as follows:
  - Budget Period – 2005-07
  - Version – TP
  - Package Program – All
  - Budget Level – All
  - View Locked Decision Packages Only - unchecked
- Select **OK**. You should now be back on the **List Decision Package by ID** screen with a decision package TP-Template showing.

**Budget Summary Console - List Decision Packages by ID**

File Edit View **Tools** Reports Help

List Decision Packages by ID

	Package Program	Decision Package	Title	Agency Priority	Program Priority	Status	Loc
1		PL-TP	Template Decision Package	0		Draft	

Sort Set Filter to All

Agency: 105 Budget Period: 2005-07 Version: TP Package Program: ALL Budget Level: ALL 5.0.153

- Click once to highlight the template decision package, then select **File / Save As** from the BDS menu bar.

**Save Decision Package**

**New Decision Package**  
Enter the information below that will define the decision package that the data will be saved to.

Budget Period: 2005-07  
Version: DP - Use a different version - see s  
Budget Level: PL - Performance Level

Decision Package Code: PL CH

View Decision Package Codes  
☐ Used for this Version  
☒ Available for this Version  
 CC  
 CD  
 CE  
 CF  
 CG  
 CH  
 \* indicates reusable codes

Package Program: Agency Level  
 Package Title: Washington Finance Academy  
 Package Long Title:

☒ Open this decision package after Save. Decision package filter will be modified.  
☐ Include Data ☐ Include Text ☐ Reverse Signs

Save Cancel


7. Pick the decision package options as follows:

- Budget Period – 2005-07
- Version – See Exercise Slip
- Budget Level – PL
- Decision Package Code – See Exercise Slip
- Package Program – Agency Level *Not available for change*
- Decision Package Title – Washington State Finance Academy
- Decision Package Long Title – Leave blank, BDS will use the title above in its place.
- Open this decision package after save – checked
- Include Data – unchecked
- Include Text - unchecked
- Reverse Signs – unchecked *Not available for change*



8. Click the **Save** button then **Yes** to confirm selections and **OK** when saved. *Since you have checked to open after save, the decision package will automatically open. It opens to the Narrative screen, as narrative is required for this budget level.*


The screenshot shows a software window titled "Decision Package Console - Package Narrative - PL-CH Washington State Finance Academy". The window has a menu bar with "File", "Edit", "View", "Tools", "Reports", and "Help". Below the menu bar, there are tabs for "Affected Programs" and "Agency Level". The main area is divided into two panes. The left pane has a yellow background and contains the following sections: "Package Title." with the text "Washington State Finance Academy"; "Package Description. (Please also indicate the agency activities -- per your agency activity inventory -- affected by this package.)" with the text "OFM proposes to renovate the existing financial training program for state agencies into a comprehensive education program called the Finance Academy."; "Recommendation summary text. (Used in OFM Budget Systems)" with the text "Development of a comprehensive education program called the Finance Academy."; and "How this decision package contributes to the agency's strategic plan and its activities and..." which is partially obscured. The right pane has a white background and contains the text "Development of a comprehensive education program called the Finance Academy." Below the panes are three buttons: "Spell Check", "Apply", and "Reset". At the bottom of the window, there is a status bar with the text "Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-CH" and a version number "5.0.153" on the right.

9. Click on the **Package Description** heading on the left. Your cursor should now be in the right hand side white text box.

10. Type an appropriate description for this decision package in this text box.  *Note: You may paste text from another document in here by hitting <CTRL-V> or using the right mouse button.*

OFM proposes to renovate the existing financial training program for state agencies into a comprehensive education program called the Finance Academy.

11. Click the **Spell Check** button and follow the instructions of any dialog boxes you receive until back at the starting screen and spell check changes are recorded.  *Note: You will not be able to add new words to the dictionary in BDS. This may be inconvenient if using acronyms.*
12. Click the **Recommendation summary text** heading.
13. Use the scroll bar of the left-hand side of the screen to scroll up and verify information entered in the **Package Description** is displayed in blue text.
14. Type appropriate Recommendation Summary text in the white text box.  *Note: Recommendation Summary text is a very brief summary of the decision package. This entry is used as the basis for the Governor's budget text. The budget instructions ask that you limit this to 100 words.*
- Development of a comprehensive education program called the Finance Academy.
15. Repeat for each category as needed.

 *A note about decision package narrative– Recommendation Summary text is the only category required for **electronic** release of your budget. OFM does require you address all categories on the printed decision package, but if you are preparing your decision package outside of BDS, you need only record Recommendation Summary text here. Check with your central budget shop to determine if you should complete all categories in BDS. Check with your central budget office if unsure which categories you are required to address.*

16. Select **File / Save Current Tab Set** from the BDS menu bar.
17. Select **Edit / Expenditure Detail Amounts** from the BDS menu bar.
18. Click the **Fund Detail** tab.
19. Select **View / Show/Hide FY SubTotals** from the BDS Menu bar.

**Decision Package Console - Expenditure/Staffing Detail Amounts - PL-CH Washington Finance Academy**

File Edit View Tools Reports Help

Fund Detail | Objects of Expenditure Detail | FTE Detail | Affected Programs/Activities | Expenditure Notes

Fund AT Code	Fund AT Title	Total FY2006	Total FY2007	020 / A008 FY 2006	020 / A008 FY 2007	030 / A001 FY 2006	030 / A001 FY 2007
001-1	General Fund - State	15,000	20,000	5,000	10,000	0	0
001-2	General Fund - Federal	0	0	0	0	0	0
181-1	Violence Reduction - State	0	0	0	0	0	0
419-6	Data Processing Rev - Non A	5,500	7,000	2,000	3,500	0	0
<-- Enter Fund Here							
<b>Total</b>		<b>20,500</b>	<b>27,000</b>	<b>7,000</b>	<b>13,500</b>	<b>0</b>	<b>0</b>
<b>Biennial Total</b>			<b>47,500</b>		<b>20,500</b>		

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-CH 5.0.153

20. Enter the fund estimates by program in the worksheet.


	Program 020/A008		Program 030/A008	
	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year
001-1	5,000	10,000	10,000	10,000
419-1	2,000	3,500	3,500	3,500

21. Select the **Objects of Expenditure Detail** tab.

Decision Package Console - Expenditure/Staffing Detail Amounts - PL-CH Washington Finance Academy							
File Edit View Tools Reports Help							
Fund Detail Objects of Expenditure Detail FTE Detail Affected Programs/Activities Expenditure Notes							
Object Code	Object Title	Total FY2006	Total FY2007	020 / A008 FY 2006	020 / A008 FY 2007	030 / A001 FY 2006	030 / A001 FY 2007
A	Salaries And Wages	0	0	0	0	0	
B	Employee Benefits	0	0	0	0	0	
C	Personal Serv Contr	0	0	0	0	0	
E	Goods And Services	5,500	7,000	2,000	3,500	0	
G	Travel	0	0	0	0	0	
J	Capital Outlays	0	0	0	0	0	
N	Grants, Benfts Servs	15,000	20,000	5,000	10,000	0	
P	Debt Service	0	0	0	0	0	
	<-- Enter Objects Here						
Total		20,500	27,000	7,000	13,500	0	
	Biennial Total		47,500		20,500		
	Fund Totals	20,500	27,000	7,000	13,500	0	
	Difference Total	0	0	0	0	0	

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-CH 5.0.153

22. Select **View / Show/Hide FY SubTotals** from the BDS menu bar.

 A note about objects – Objects are not required in BDS electronic release to OFM. However, using objects in BDS is recommended. By including objects in all steps of your budget development you will be able to use BDS reports and data for more complete analysis when objects are included.

23. Enter your estimates by object and program into the worksheet.

	Program 020/A008		Program 030/A008	
	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year	1 <sup>st</sup> Fiscal Year	2 <sup>nd</sup> Fiscal Year
E – Good And Services	2,000	3,500	3,500	3,500
N – Grants, Benefits, Servs	5,000	10,000	10,000	10,000

24. Select **View / Balance Funds to Objects** from the BDS menu bar to verify that the amounts entered on the Fund and Object tabs are in balance.

25. Select **File / Save Current Tab Set** from the BDS menu bar.

26. Select **Edit / Performance Measures** from the BDS menu bar.

**Decision Package Console - Performance Measures - PL-CH Washington State Finance Academy**

File Edit View Tools Reports Help

Activities | Performance Measure Detail | Performance Measure Notes

Supported	Activity Title
<input type="checkbox"/>	A001 - Accounting Services for Other Agencies
<input type="checkbox"/>	A002 - Administrative Activity
<input type="checkbox"/>	A003 - Assessment Payments on State Lands
<input type="checkbox"/>	A004 - Budget Driver and Expenditure Forecasts, Research and Monitoring
<input checked="" type="checkbox"/>	A005 - Central Financial Systems Development and Maintenance
<input type="checkbox"/>	A006 - Collective Bargaining
<input type="checkbox"/>	A007 - Criminal History Federal Grant
<input type="checkbox"/>	A008 - Governor's Budget Development
<input type="checkbox"/>	A009 - Office of Regulatory Assistance
<input type="checkbox"/>	A010 - Personal Service and Client Service Contracts
<input type="checkbox"/>	A011 - Population Estimates, Forecasts and Census Data
<input type="checkbox"/>	A012 - Risk Management
<input type="checkbox"/>	A013 - Statewide Accounting Policies and Reporting

Apply Reset

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-CH 5.0.153

27. Click on the box to select the **Activity** that this decision package supports then click **Apply**.

**A005**

28. Click the **Performance Measure Detail** tab.

**Decision Package Console - Performance Measures - PL-CH Washington State Finance Academy**

File Edit View Tools Reports Help

Activities | Performance Measure Detail | Performance Measure Notes

Impacted	PM Type	Performance Title	Unit	Incremental Change FY1	Incremental Change FY2	Prior Bien FY1	Prior Bien FY2
<input type="checkbox"/>	OP	1010 - Fastrack Reports	Number	0.00	0.00	400	600
<input type="checkbox"/>	OP	1020 - Travel Voucher System \	Number	0.00	0.00	10000	12500
<input type="checkbox"/>	OC	8010 - Hands-off Payments	Percent	0.00	0.00	45	50
<input type="checkbox"/>	OC	8020 - Electronic Payments	Percent	0.00	0.00	30	31

Apply Reset

Agency: 105 Budget Period: 2005-07 Version: DP Package Program: Decision Package: PL-CH 5.0.153

58. Record the incremental changes to each performance measure that is impacted by the decision package by year.

**None apply, make no changes**

29. Select **Reports / OFM Reports / Decision Package**. *Note: If you are one of the following agencies, select the Decision Package with Program Detail Report: DOC, DSHS, DVA, DOT, WSP, DOL, DOT, BRI, SPI, CRS.*
30. Answer **Yes** for "**Do you want this formatted for Word?**" *Note: Formatting for Word makes adjustments in the header and page number so that the report displays in Word properly.*

Preview

State of Washington  
Decision Package

**DRAFT**

**Agency:** 105 Office of Financial Management

**Decision Package Code/Title:** CH Washington State Finance Academy

**Budget Period:** 2005-07

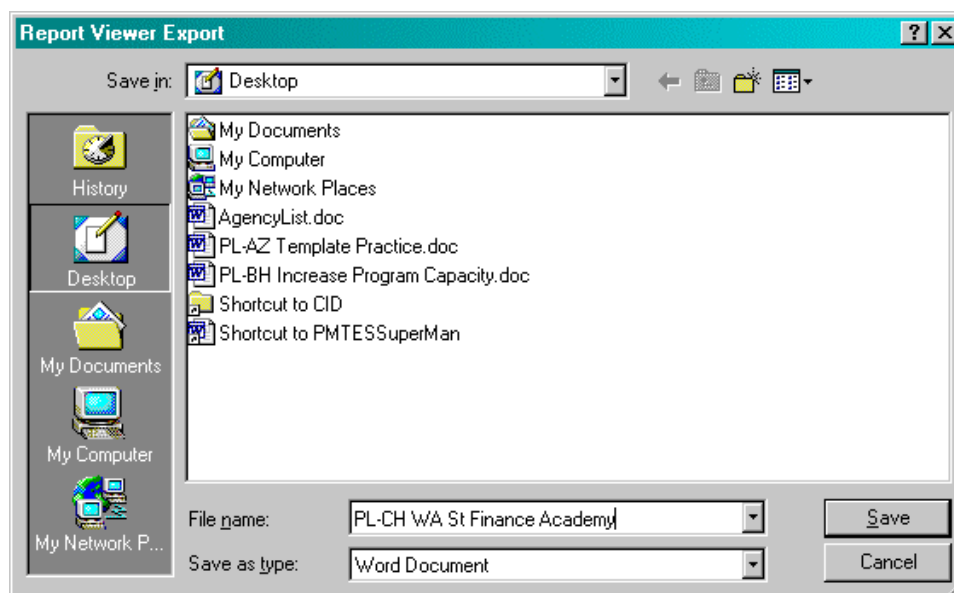
**Budget Level:** PL - Performance Level

**Recommendation Summary Text:**  
Development of a comprehensive education program called the Finance Academy.

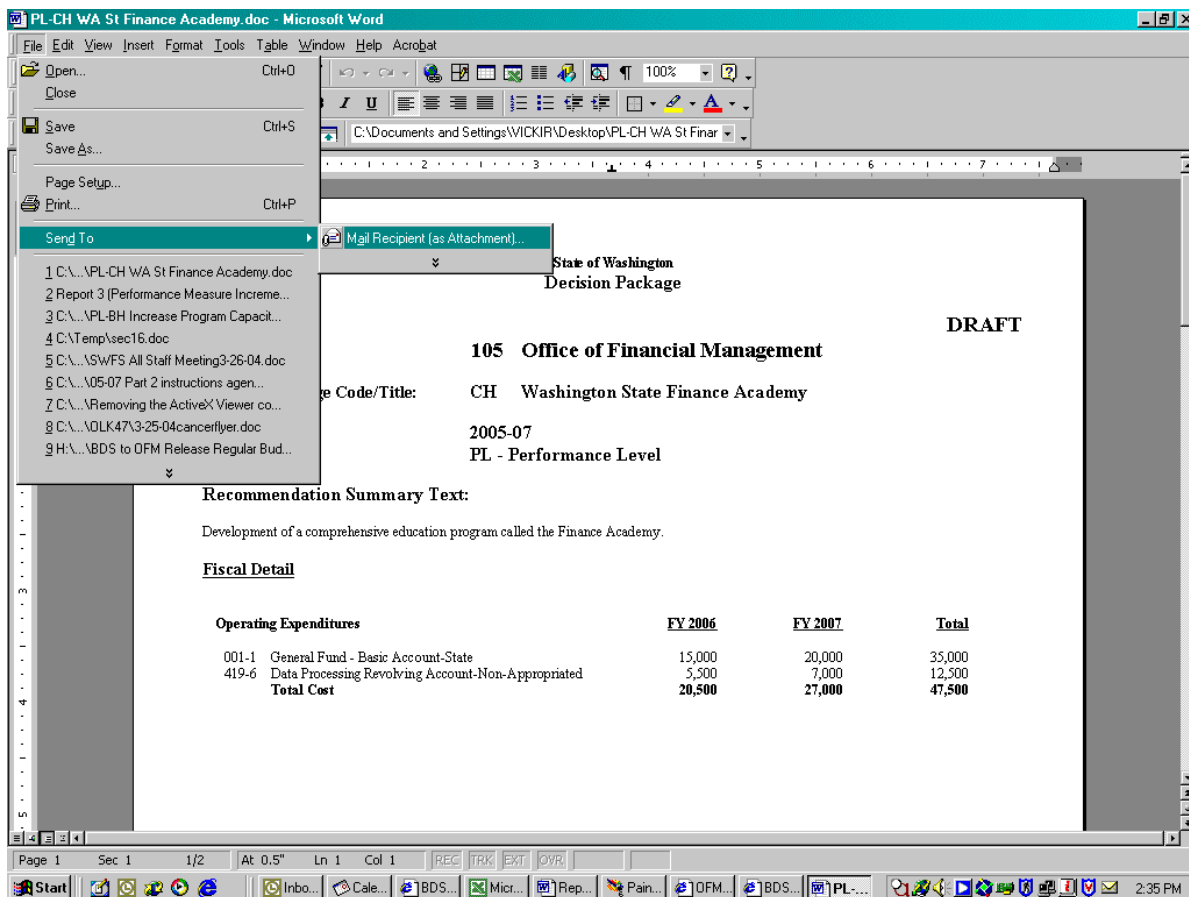
**Fiscal Detail**

Operating Expenditures	FY 2006	FY 2007	Total
001-1 General Fund - Basic Account-State	15,000	20,000	35,000
419-6 Data Processing Revolving Account-Non-Appropriate	5,500	7,000	12,500
<b>Total Cost</b>	<b>20,500</b>	<b>27,000</b>	<b>47,500</b>

31. Click the envelope icon with the red arrow after the report is displayed.
32. Change **Save as type** to **Word Document**.



33. Change the **Save in** option to reflect the drive and directory you would like to save the decision package in.  
**Desktop**
34. Name the file with the decision package code and title and select **Save**.  
**See Exercise Slip**
35. Answer **Yes** for "**The report has been exported. Would you like to open it?**"
36. Once the report has opened in Word, select **File / Send To / Mail Recipient (As Attachment)**  
**View this option but do not select when in training**



37. Send e-mail as normal. The Decision Package is attached.
38. Close Word.
39. Click **Return** to close the report in BDS.
40. Select **File / Exit and Logoff** from the BDS menu bar.

***You Did It!!!***

## Appendix 1 – Business Rule Notes

### Add Decision Package

- The package long title is optional. This title will print on internal reports only and will not be sent to OFM. In the event this title is left blank, the package title will be used on internal reports.
- Maintenance level decision packages should use OFM pre-assigned codes. If your decision package does not fall into any of the categories offered by OFM select a decision package code that is numeric-alpha (1A) or alpha-alpha (AA). You will not be able to release data that does not meet this rule.
- Decision package titles for codes pre-assigned by OFM cannot be changed. Decision packages that for a purpose covered by OFM pre-assigned codes (e.g., decision packages that are for requesting funding to cover General Inflation changes) should be entered using the OFM pre-assigned code (98) and title (General Inflation). This rationale applies to all OFM pre-assigned decision package codes. Please see the budget instructions for further information.
- A title will stay with a decision package code for the entire biennium once OFM has a title.
- Contact your budget office if unsure what Version to use.
- Package Program is an advanced feature that is not discussed further in this tutorial. The use of package program is only recommended in rare cases, such as DSHS budget building.
- Checking to **Open this Decision Package after save** will result in the decision package being opened to the appropriate screen.

### Expenditure Detail Amounts

- FTEs are not required by OFM at the fund level. It is okay to group all FTEs into fund 996-Z. However, agencies may choose to break FTEs out by the funds that salaries are paid from for a more accurate analysis.
- The **Affected Programs/Activities** tab is the easiest way to code your estimated expenditures to the appropriate activity and program combination.
- Agencies appropriated by program must assign a program to each estimate. Use of program is recommended for all agencies with more than one program in order to use BDS for the report requirement, Agency Budget Levels by Program.
- The maintenance level total of a version must be available by activity. An exercise, Recast Maintenance Level is described in the BDS Basic Budget tutorial/class to assist agencies in meeting this requirement.
- All performance level decision package estimates must be identified to an agency activity.
- Fund 996-Z is a placeholder fund only. This fund may be used in the interim for budget development, however any dollars must be allocated to real funds and 996-Z be zero before agencies can release data to OFM.
- Objects are not required in BDS. However, using objects in BDS is recommended. By including objects in all steps of your budget development you will be able to use BDS reports and data for more complete analysis. The level of object to enter data at will vary by agency. One option is to enter objects at the same level you allot.
- Fund 996-Z is allowed for non-transportation FTEs as OFM does not budget FTEs by fund. However, it is recommended that you enter FTEs by fund to provide for better analysis of BDS reports and data.

## Narrative

- Recommendation Summary text is a very brief summary of the decision package. This entry is used as the basis for the Governor's budget text. The budget instructions ask that you limit this to 100 words.
- Recommendation Summary text is the **only category required for electronic** release of your budget. OFM does require you to address all categories on the printed decision package, but if you are preparing your decision package outside of BDS, you need only record Recommendation Summary text in BDS.
- The spell check function in BDS does not allow users to add words to its dictionary. This function may be cumbersome if acronyms are commonly used.
- Users can "paste" copied text from another category, decision package, or non-BDS document by clicking the right mouse button and selecting the Paste option from the menu.

## Performance Measures

- Performance measures can be added, edited, or deleted in the activity component of BDS. Each version has its own set of performance measures.

## Pre-Release Edits

- Critical items **MUST** be corrected in order to electronically release data. Warnings indicate that there is something that might not be consistent with business rules, but the electronic release will not be prohibited.

## Decision Package Report

- You have the option of downloading this report for Word by clicking the icon with the envelope and red arrow and saving as file type "Word". If you choose this option, you should have replied Yes to 'format for Word'. Once in Word, you would be able to add any custom formatting or graphics necessary.
- Agencies that are appropriated by program should run the Decision Package Program Detail so the estimates will be displayed by program.
- Choosing to format reports for Word means that headings and page numbers will be adjusted so that the report displays in Word properly. Some formatting will be lost.
- Save Word copies of decision package reports to an appropriate directory for your organization for easy sharing. This may be a central network drive.

## Appendix 2 – Pre-Release Edits

The pre-release edit report will flag these issues for agency correction. The updated Pre-Release Edit Report will be available in BDS mid-June 2004.

Funds	Invalid Funds: 406; 427; 429; 239; 996 (except for FTEs); 999	Critical
Appropriation Type	Invalid appropriation types: 3, 4, 9	Critical
Decision Package Code/Title	Numeric package codes not allowed for ML and PL level packages ( <i>except DSHS and OFM assigned codes</i> ) OFM assigned codes will have OFM reserved title.	Warning
Narrative (Agency Level)	Recommendation Summary Text required at the agency level ( <i>exception follows</i> ).	Critical
Narrative (Program Level)	Recommendation Summary Text is required at the program level for the following agencies: DSHS OSPI DOT	Critical
Narrative (all other text)	Users will receive a warning if not all of the categories contain text. OFM will require that these categories be addressed in the printed decision package.	Warning
Narrative (exceptions)	The following decision packages do not require narrative: Revenue only decision packages Codes 91, 97, 98, 99, 9Z	No message
FTEs	The following agencies must have transportation FTEs identified by fund: DOL WSP	No message
Decision Package Titles	If the OFM internal system (WinSum) has a different decision package title assigned to a decision package code, users will be warned that the WinSum title will be used if the decision package is released.	Warning
Maintenance Level Total by Activity	The total maintenance level total budget must match the activity totals at maintenance level.	Critical
Performance Level Decision Packages by Activity	Performance Measure decision packages must provide activity information for each increment.	Critical
M2-9Z Recast to Activity decision package	Decision Package M2-9Z Recast to Activity must have a net balance of zero.	Critical

Activities without estimates	Activity XXX that do not have incremental estimates tied (or maintenance level cumulative) should not be sent to OFM.	Warning
Activities without performance measures or expected results	Activities that do not have performance measures or expected results identified should not be submitted to OFM.	Warning
9Z for Regular Budget	9Z Recast to Activity decision package must be budget level M2 for regular budget.	Critical
Carryforward Level check	Fund & FTE data will be compared to OFM as a total for the agency for agencies that submit at the agency level. Fund & FTE data will be compared to OFM as a total for the agency/program for the agencies that submit at the program level. (Subprogram level for DSHS JR, MH and DD.) DOL and WSP will be compared at the agency total for all funds.	Critical – this is a change from a warning
Federal Funds Match	Total estimates expenditures for Federal Dollars, Fund/AT 001-2, of \$1,800,000 has a variance from the estimated revenues in Fund 001, Major Source 03 Federal of \$500,000 for a difference of - \$1,300,000. Generally, estimated expenditures and revenues must net to zero at the statewide level for federal funds.	Warning
Private/Local Match	Total estimated expenditures for Private/Local dollars, Fund/AT 001-7, of \$1,800,000 has a variance from the estimated revenues in Fund 001, Major Source 05 Federal of \$500,000 for a difference of -\$1,300,000. Generally, estimated expenditures and revenues must net to zero at the statewide level for federal funds.	Warning
Special Major Source/Source	Major Source 04, Source 01 is not a valid revenue source for your agency.	Warning

## **Appendix 3 – Decision Package Sample**

Begins on the next page

State of Washington  
Decision Package

**DRAFT**

**Agency:** 105 Office of Financial Management

**Decision Package Code/Title:** HE Six-Year Driver License

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**Budget Period:** 2003-05

**Budget Level:** PL - Performance Level

**Recommendation Summary Text:**

The four-year driver's license (and associated endorsements) renewal cycle is converted to a six-year cycle (including motorcycle and commercial driver license endorsements). Wait times will be reduced for Washington residents getting driver license renewals. The conversion will be phased-in over a six-year period.

**Fiscal Detail**

Operating Expenditures	<u>FY 2004</u>	<u>FY 2005</u>	<u>Total</u>
106-1 Highway Safety Account-State	77,000	238,000	315,000
<b>Total Cost</b>	<b>77,000</b>	<b>238,000</b>	<b>315,000</b>

Staffing	<u>FY 2004</u>	<u>FY 2005</u>	<u>Annual Average</u>
FTEs	.0	4.5	2.3

**Revenue**

<u>Fund</u>	<u>Source</u>	<u>FY 2004</u>	<u>FY 2005</u>	<u>Total</u>
082 Motorcycle Safety Ed	0254 Motor Vehicl Op Lic		5,492,000	5,492,000
106 Highway Safety Accnt	0254 Motor Vehicl Op Lic		249,000	249,000
<b>Total Revenue</b>			<b>5,741,000</b>	<b>5,741,000</b>

**Package Description:**

\*\*\*Please note: This sample Decision Package is based upon an actual decision package used by DOL, but has been amended for purposes of providing this example.\*\*\*

The department proposes to extend the time between driver license renewals and associated endorsements from four years to six years. This change will decrease renewal wait times and improve customer service. Furthermore, reducing the volume of transactions processed at each License Service Office (LSO) has the benefit of freeing up more time for staff to improve other services. This initiative is also an element of the Department of Licensing's performance-based budget request required under Section 503 of ESSB 6456.

Although the average wait time across the state is approximately 11 minutes and the actual time for delivering the service is about 9 minutes, an estimated 120,000 customers experienced wait times in excess of 30 minutes over the last two years. The average statistic masks a significant customer service problem of excessive wait times. During peak business hours, many customers experience wait times of an hour or more.

Longer wait times contribute to customer dissatisfaction with the department and state government as shown by our customer comment cards. A review of almost 2,000 comment cards over the last year reveals that 60 percent of those persons who waited more than 20 minutes for a renewal said the service "needs improvement." And of those who waited more than 40 minutes, 82 percent said

State of Washington  
Decision Package

**DRAFT**

**Agency:** **105 Office of Financial Management**  
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the service needs improvement. On the other hand, of those customers who waited less than 20 minutes, 91.5 percent reported that the service was either "Excellent" or "Above Average." In short, wait times are a critical factor in determining the public's perception of service quality as provided by the Licensing Service Representatives (LSRs).

Long waits are a source of frustration for LSRs as well. Their ability to provide high quality service to customers suffers from the high volume of workload. This is particularly true as they must serve customers who, due to excessively long waits, are dissatisfied with the agency's service even before they are called up to the counter.

Customers not receiving service within their own available time frames often leave the LSO only to have to return on another occasion. Customer comment cards identifying this problem and the dropout rate recorded from "take-a-number" (Q-Matic) stations confirm that this is true. When the number of customers and wait time increases, the number of abandoned line positions increases.

Greater language diversity, population growth, and the simultaneous graying of the baby boomers and the effect of the baby boom "echo" mean that more customers are requesting service. In addition, many of these services, such as disabled parking placards, require greater involvement and time of the LSR. Yet staff growth has not kept pace with these service demand increases.

#### SUCCESS IN OTHER STATES

Currently, 32 other states and half the Canadian provinces have enacted legislation providing for license renewal cycles in excess of four years (see table below). Some states have renewal and extension periods as great as 16, 15, and 8 years. Nationwide statistics on motor vehicle traffic fatalities and injuries have not shown a negative traffic safety impact from the extended license renewal cycles. The fatality and injury accident rates in jurisdictions with renewal cycles in excess of four years are consistently within the same range as states with renewal cycles less than or equal to four years.

States with Renewal or Extension Periods Greater than Four Years: Alaska, Louisiana, Rhode Island, Arizona, Maine, South Carolina, California, Maryland, South Dakota, Colorado, Massachusetts, Tennessee, Connecticut, Michigan, Texas, Delaware, Montana, Utah, District of Columbia, New York, Virginia, Florida, North Carolina, West Virginia, Hawaii, Nevada, Wisconsin, Idaho, North Dakota, Wyoming, Kansas, and Oregon.

#### WHY A SIX-YEAR IMPLEMENTATION PERIOD IS NECESSARY

In order to smooth the workload and revenue collection over the next four biennia, the current renewal licenses must be distributed as evenly as practicable. If this "smoothing" did not happen and every driver that came in for a license renewal during the next four years were given a six-year renewal, by the fifth and sixth years, the only applicants coming into the office would be those getting an original license. This would equate to an 88 percent drop in workload activity. Staff will have little work for two years (and excellent wait time performance measures); but in years eight, nine, ten, and eleven, the workload would dramatically increase again to process the renewals, and wait times would be intolerable.

In essence, the renewal workload cycle will be heavy for four years, creating tremendous wait times, then almost nonexistent for two years, then heavy again for four years, etc. Staff levels would be difficult to maintain in an irregular cycle of this type. In addition, the revenue flow would follow the same irregular pattern.

#### PROPOSED IMPLEMENTATION PLAN

The implementation plan follows the principles that no individual will go longer than six years without visiting an LSO and no one has to go to an LSO more than once every four years during the transition. By using a pattern of four-year renewals (the current renewal period), two-year renewal extensions, and six-year renewals, the two-year gap in renewal license activity is filled without requiring the customer to visit a LSO more than they currently do under the four-year system.

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Decision Package

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An additional four temporary employees will be required to process and issue mail-in extensions of current driver licenses. These FTEs are needed to assure that the customers understand and complete the necessary steps to achieve a balanced workload.

Between July 1, 2000 through June 30, 2002, approximately two-thirds of the customers renewing their driver licenses and associated endorsements will move to a six-year cycle. One-third of the renewing customers will be given a two-year extension of their existing four-year license. They will then be on a six-year cycle. All original licenses will be issued for six years and those licensees will continue on a six-year cycle.

Between July 1, 2002 through June 30, 2004, approximately one-third of the renewing customers will renew for four years, as they do today, and will move to a six-year cycle on their next renewal. The other two-thirds of the customers renewing their driver licenses and associated endorsements will move to a six-year cycle. All original (first time Washington licenses) licenses will be issued for six years and those licensees will continue on a six-year cycle.

Starting on July 1, 2004, implementation of the six-year renewal cycle is complete. All original licenses and renewal licenses will be issued for a six-year period.

#### PERFORMANCE EFFECTS

As a result of moving to a six-year license, wait times for renewal licenses will drop by almost a third. This effect will be seen in the third year of implementation. The initial two years will not see a drop in renewal traffic at the office. However, by the third year an estimated 325,000 fewer people will not be required to come to an LSO. The effect on wait time is direct in that where there once were six people in line for renewals, there will now be only four – a one-third decrease in renewal wait time is anticipated. This will also have a significant effect on the maximum wait times.

As part of the performance-based budget package, this proposal represents one of the key elements of the three-pronged approach for achieving performance improvement related to wait and service times for license renewals. The three elements address improved peak-load capacity (Increase Staffing in LSO Offices, Decision Package HG), reduced workloads (six-year licensing, Decision Package HE), and faster delivery of service (Improved Driver License, Decision Package HD). Among these three approaches, this proposal has the least immediate effect on wait times, though the revenue impact does begin to occur in the 2001-03 Biennium. From among the three approaches, by the 2003-05 Biennium, it will have the broadest impact on all offices' wait times.

This proposal is also the best example of the benefits of strategic planning over a six-year period. Using a long-range perspective made possible by strategic planning, initiatives that add value beyond the 2001-03 biennium can be evaluated with a focus on achieving a coherent agency vision. This process moves the agency away from the short-term, incremental budget choices that characterize traditional budgeting and focuses our efforts on achieving our performance goals.

#### INCREASED REVENUE WITHOUT A FEE INCREASE

Currently, a fee of \$14 is charged to renew a license for a four-year period. This is equivalent to \$3.50 for each year of the license. That annual rate will not change. People renewing their license will be charged a fee equivalent to the number of years the license is in effect. For example during the phased implementation: Those renewing for a six-year license will pay \$21 (\$3.50 x six years). Those renewing for 4 years will still pay \$14 (\$3.50 x four years). Those receiving a two-year extension pay \$7 (\$3.50 x two years). Motorcycle and commercial driver license endorsements (CDL) fees would be prorated in the same fashion. A renewal reminder postcard will be mailed to each licensee and will state the new renewal period and the appropriate fee.

As other states have done, the DOL implementation approach will have two-year extensions. DOL will send a renewal mailer to the customer instructing them to return the envelope with their \$7 renewal fee to DOL. DOL will mail back a special sticker, with

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instructions to adhere it to the back of the customer's license. To prevent fraud, the sticker will be produced with the customer's license number, name, current address, and the expiration date of their license. The sticker has a special adhesive that will cause the sticker to destruct if it is removed from the license. The date of expiration will be extended on the licensee's record in the Driver Division's computer database. This entry will allow law enforcement officers to verify license expiration dates whether a sticker is present or not.

The mail-in and extension process described above is not new to the department. DOL has extensive experience with handling mail-in renewals of licenses (both in Vehicles and Business and Professions) and in the use of special stickers. In many respects, the current vehicle licensing tabs are analogous to the licensing extension proposal.

### **Narrative Justification and Impact Statement**

#### ***How contributes to strategic plan:***

To meet the agency goal to optimize the cost, accuracy, access, and speed of services to its customers, the agency proposes to extend the time between license renewals.

#### **Performance Measure Detail**

**Activity: A001 Driver's Services**  
**customers.**

	Incremental Changes	
	<b><u>FY 2004</u></b>	<b><u>FY 2005</u></b>
<b>Outcome Measures</b>		
1.1 Total renewal service completion time (in minutes).	0	(4.1)
1.2 Average renewal wait time (in minutes).	0	(4.1)
1.3 Average maximum renewal wait time (in minutes).	0	(12.8)
<b>Output Measures</b>		
1.4 Number of renewal customers in LSOs.	0	(324,513)

#### ***Reason for change:***

This will reduce customer wait time in the LSOs and allow for management of workload growth.

#### ***Impact on clients and services:***

With fewer customers renewing beginning in FY 2003, customers will experience shorter wait times. This also provides an opportunity for LSO staff to pay more attention to traffic safety and document security issues in a less stressful environment.

#### ***Impact on other state programs:***

Extensive research and coordination has occurred between the Washington Traffic Safety Commission, the Washington State Patrol, and local law enforcement in the development on this decision package. All parties have concurred with the proposal from the aspect of public safety. The Traffic Safety Commission will be using this as a research opportunity to evaluate the effect of longer licensing periods on traffic safety among high-risk drivers.

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***Relationship to capital budget:***

None

***Required changes to existing RCW, WAC, contract, or plan:***

This proposal will require changes to statutes (RCW 46.20.181 and RCW 46.20.505) and rule (WAC 308-100-050) which define the license expiration period and the renewal and endorsement fees, and establish when renewals will occur. The statute, effective July 1, 2002, will need to be modified to authorize:

- \* A six-year license.
- \* The department to adopt policies consistent with the goal of effectively distributing its renewal workload over a six-year term. Such language would allow us to issue variable length licenses and license expiration extensions through June 30, 2004.
- \* The department to prorate license renewal and endorsement fees on a per-year basis.

***Alternatives explored by agency:***

DOL researched the option of increasing the number of FTE staff to provide an adequate number of staff to meet the goal of prompt, accurate service. However, an estimated 77 FTE staff would be needed to achieve a reduction in customer service renewal wait time equivalent to the results of this proposal and would require the costs of opening additional offices.

The 77 additional FTE staff would cost \$4.6 million each year (including agency support costs) and a capital budget package would be required to add five additional facilities in our busiest locations. The cost per facility is approximately \$2.5 million, depending upon location, for a total of \$12.5 million.

While additional FTEs form a part of the department's solution to address the service demand for LSO services and reducing customer wait times, the costs of an FTE-only solution (including the related facilities, supplies, and equipment) is not the most cost-effective approach.

Other options, which are not mutually exclusive, include: reduce the time it takes to actually provide the service through the use of improved technology; or reduce the service demands for other driver services and redirect the resources to renewal licensing.

***Budget impacts in future biennia:***

FY 2004, a total of \$69,000 will be required for startup of the license extension process. Costs include printing, postage, goods and services, and travel costs required for implementation and training less estimated savings for renewal postcards that will not be printed.

FY 2005, a total of \$214,000 will be required for the license extension process. This includes costs for printing, postage, goods and services less estimated savings for renewal postcards that will not be printed.

FY 2006, a total of \$188,000 will be required for the license extension process. This includes costs for printing, postage, goods and services, less estimated savings for renewal postcards that will not be printed.

FY 2007, an estimated savings of \$64,000 for renewal postcards that will not be printed.

FY 2008 and beyond, no future budget impacts are anticipated.

In subsequent biennia, the two FTEs provided in the 2001-03 Biennium will no longer be required, and a reduction of \$167,000 per year is proposed in the 2003-05 Biennium carry-forward level.

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***Distinction between one-time and ongoing costs:***

The staffing costs in this decision package are one-time for 2001-03 Biennium.

***Effects of non-funding:***

The effects of non-funding will be steadily increasing wait times for customers because of population growth, as well as impairment of the department's ability to promote traffic safety. The revenue acceleration that will not occur may result in the need for a fee increase within the current six-year planning horizon. The effect of non-funding on performance means that the reduction of wait times will not occur, because drivers will be coming into licensing offices more frequently to review their licenses.

***Expenditure Calculations and Assumptions:***

**REVENUES**

A significant acceleration of revenues occurs during the first four years of implementation. This is because persons receiving an original license or renewing their licenses will be paying \$7 sooner than under a four-year licensing period. As a result, revenues increase by about \$5.7 million in FY 2003.

**EXPENDITURES**

DOL will need increased expenditure authority starting in FY 2002 to implement the first phase of the plan. This increase is primarily for additional temporary FTE staff (one-half time IT Systems Specialist 4, and four License Service Representatives 1) and one-time programming costs for system changes necessary to accommodate the six-year renewal cycle. Costs to Drivers Services for printing, mailing, and processing license extensions will not begin until the 2003-05 Biennium. These costs are estimated to be less than \$300,000.

<b><u>Object Detail</u></b>	<b><u>FY 2004</u></b>	<b><u>FY 2005</u></b>	<b><u>Total</u></b>
A Salaries And Wages		128,000	128,000
B Employee Benefits		39,000	39,000
E Goods And Services	77,000	71,000	148,000
<b>Total Objects</b>	<b>77,000</b>	<b>238,000</b>	<b>315,000</b>

## Tutorial Evaluation

### BDS Decision Packages for Managers

	Strongly Disagree				Strongly Agree	
This tutorial was helpful in getting me through the business process	1	2	3	4	5	
This tutorial was helpful in getting me through the system technical processes	1	2	3	4	5	
Additional training was not necessary given the structure and content of this tutorial	1	2	3	4	5	
The steps of the tutorial successfully anticipated the special needs of my agency	1	2	3	4	5	
The tutorial was clear, concise, and easy to understand	1	2	3	4	5	
I did not need to request additional assistance to complete the business process	1	2	3	4	5	
It was easy to find answers to my specific question in this tutorial	1	2	3	4	5	

The best feature of this tutorial is: \_\_\_\_\_

The worst feature of this tutorial is: \_\_\_\_\_

I found errors (grammar, punctuation, spelling, conceptual, technical) on the following pages:

\_\_\_\_\_

Other comments: \_\_\_\_\_

\_\_\_\_\_

Thank you for taking the time to complete this survey. This information will be used in revising this tutorial as well as developing future BASS tutorials. Please remit to:

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